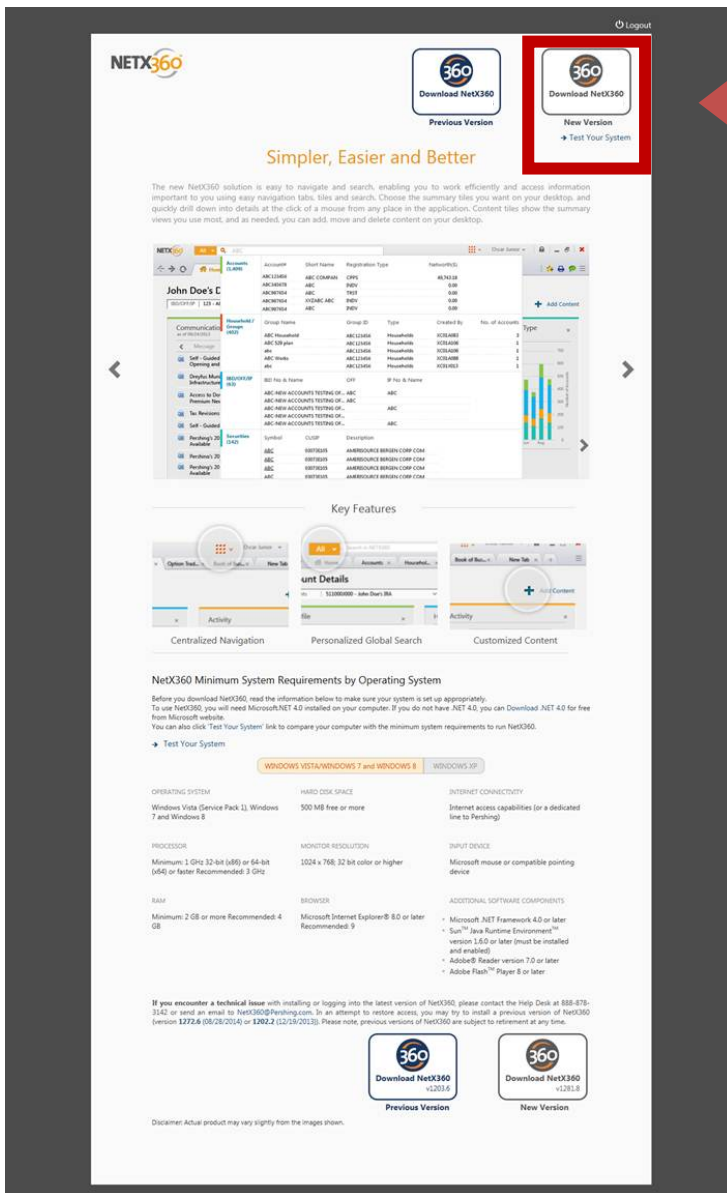


# NetX360 “New Version” DOWNLOAD INSTRUCTIONS

Questions? Contact CBSI's Advisor Support Specialists at 888.435.7737 (HELP.REP), Ext. 483.1514.

1. Exit the Virtual Desktop (if applicable)
2. Click [HERE](https://download.netx360.com) to get to the download page (<https://download.netx360.com>)
3. Login using your Login ID and Password
4. Click **Download NetX360 New Version**, shown in the **red square** below.
5. Click **Run**
6. Click **Next** through all prompts
7. Click **Finish**



The screenshot shows the NetX360 download page. At the top, there are two buttons: 'Download NetX360 Previous Version' and 'Download NetX360 New Version'. The 'New Version' button is highlighted with a red square. Below the buttons, there is a section titled 'Simpler, Easier and Better' with a description of the new NetX360 solution. Below this, there is a table showing account information for 'John Doe's C'. The table has columns for Account, Short Name, Registration Type, and NetX360 ID. Below the table, there is a section titled 'Key Features' with three sub-sections: 'Centralized Navigation', 'Personalized Global Search', and 'Customized Content'. Below the key features, there is a section titled 'NetX360 Minimum System Requirements by Operating System'. This section includes a table with columns for Operating System, Hard Disk Space, Processor, Monitor Resolution, RAM, Browser, and Input Device. The table lists requirements for Windows Vista/Windows 7 and Windows 8, and Windows XP. Below the table, there is a section titled 'Additional Software Components' which lists requirements for Microsoft .NET Framework 4.0 or later, Sun Java Runtime Environment version 1.6.0 or later, Adobe Reader version 7.0 or later, and Adobe Flash Player 6 or later. At the bottom of the page, there are two buttons: 'Download NetX360 Previous Version' and 'Download NetX360 New Version'.

Account	Short Name	Registration Type	NetX360 ID
ABC123456	ABC COMPANY	CPNY	4676108
ABC123457	ABC	RDV	039
ABC123458	ABC	TEST	039
ABC123459	ABC	RDV	039
ABC123460	ABC	RDV	039

Group Name	Group ID	Type	Created By	No. of Accounts	Type
ABC Financial	ABC123456	Financial	ABC123456	2	100
ABC Sales	ABC123457	Financial	ABC123457	2	100
ABC Marketing	ABC123458	Financial	ABC123458	2	100
ABC HR	ABC123459	Financial	ABC123459	2	100

Symbol	CUSIP	Description
ABC	888785X1	AMERINDUOUS BOND CORP COA
ABC	888785X2	AMERINDUOUS BOND CORP COA
ABC	888785X3	AMERINDUOUS BOND CORP COA
ABC	888785X4	AMERINDUOUS BOND CORP COA

Operating System	Hard Disk Space	Processor	Monitor Resolution	RAM	Browser	Input Device
Windows Vista (Service Pack 1), Windows 7 and Windows 8	500 MB free or more	Minimum: 1 GHz 32-bit (x86) or 64-bit (x64) or better Recommended: 3 GHz	1024 x 768, 32 bit color or higher	Minimum: 2 GB or more Recommended: 4 GB	Microsoft Internet Explorer® 8.0 or later Recommended: 9	Microsoft mouse or compatible pointing device
Windows XP						

Additional Software Components
Microsoft .NET Framework 4.0 or later
Sun™ Java Runtime Environment™ version 1.6.0 or later (must be installed and enabled)
Adobe® Reader version 7.0 or later
Adobe Flash™ Player 6 or later

## NOTE!

The first time you log in, CBSI recommends you check your IBD-OFF-IP settings located in the upper left area of your landing page.

- The IBD number is **6CQ**.
- The OFF should be **ALL**.
- The IP number should be **ALL** or the **3-digit advisor id**.

You shouldn't have to do this again.